

**White House Conference on Cooperative Conservation
Day 2 Breakout Session Compilation**

Topic: Measuring Success of Cooperative Conservation Efforts

Session number: 50

Facilitator: Michael Elliott

Afternoon

Location: 231

A. Major Repeated Themes Raised in the Discussion. *A grouping of ideas repeated with some frequency in the session and brought up again during the group summation process. Also includes diverging views and/or questions about the topic.*

Bring in stakeholders early in collaborative processes to establish goals. There were strong feelings about the necessity of using collaborative processes to change regulations that seem onerous or arbitrary, while others felt that collaboratives should be working within the existing regulatory environment.

Develop clear and measurable goals. The collaborative needs to have a clearly articulated purpose. The collaborative should have a sponsor and stable source of resources for long-term monitoring and measuring of success, incorporating this workplan into a charter or other establishing document.

Need to develop a planned monitoring effort. Monitoring will not be successful if it is done on ad hoc basis. Need to share tools, and recognize the long term commitment of resources to ensure monitoring is done well.

Develop relevant and achievable measures of success. "Stretch goals" are useful and should be included in the process.

Success should be measured based both on outcome and process measures. Process measures relate to a change of behavior, both within the partnership (eg by improved communication) and changes in the behavior of the community that is impacted by the collaborative (i.e., community at large becomes better stewards, etc.). Need to be able to identify and measure the intangibles as well.

Need to communicate success and results. It's important not only to measure these things, but to share what we learned from successes and failures and to show the value of the collaborative processes. Need to have face-to-face regional summits.

B. National-level Practical Actions *that could be taken by the Federal government, national NGO's, and other national organizations. Diverging views and/or questions are also noted.*

Develop protocols by which local collaboratives may use volunteers to monitor and measure success. The protocols should be affordable in design, based on good biological process data, be specific to particular environments (eg, river systems) but general enough for many collaboratives to use.

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Build a database of case studies, resources, and lessons learned that help collaboratives define and measure success.

Build physical theoretical models that help collaboratives be more proactive in assessing emerging problems and provide base funding for early initial investigations.

Convene regional cooperative conservation conferences to follow-up on results from this conference.

Identify and utilized resources to share information and monitor progress, particularly using web-based databases.

Develop “key point models” such as the USDA food safety program uses (models which identify key points in processes where things might go wrong, and perform continual improvement).

Provide collaboratives opportunities to give feedback to government officials about how the collaborative is doing and how the government officials are doing (like the 360 degree evaluation process).

Develop guidelines for using science in cooperative conservation processes.

Convene a participatory panel to review regulatory requirements coming from outdated statutes.

C. **Local-level Practical Actions** *that could be taken at the local or community level by Tribes, state and local communities, private citizens, and local organizations. Diverging views and/or questions are also noted.*

Collaboratives should evaluate changes in behavior on the part of the community, which includes compliance with regulations, use of program elements, acceptance by the community, and constituency satisfaction.

Increase emphasis on communicating the success of the program (similar to programs developed by USDA Extension Service).

Establish precise workplans for monitoring and measuring success that keep people focused on the evaluation function.

D. **Particularly insightful quotes from participants** that capture the essence of key points made during the group’s discussion.

“Use workplans to keep eyes on the prize.”

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Session number: 50

Facilitator: Mary Lou Addor

Afternoon

Location: 232

Major Themes:

Process Drivers:

- Deadlines and timelines
- Outside pressures overseers (OMB, Departmental offices)

Communication

- Provide regular and accessible progress reports
- Equal access to information
- Use technology tools (GIS, email); media friendly tools; and use lay terms.
- Need a common understanding of changing process and technical terms (i.e., what is cooperative conservation?)

Characteristics of successful participatory processes in setting goals and desired outcomes.

- Rules of engagement
- Facilitation of the process by outside party
- Shared vision
- Setting clear goals
- Ensure commitment
- Right people involved
- Transparency of and in the process
- Acknowledge that stakeholders have different values
- Everyone needs to be willing to bring something to the table and be flexible in giving of it.
- Face to face meetings especially in the early stages as opposed online group sessions.
- Focus on human dimensions of the process and link that into focusing on the numeric goals backed by science that again link into the human values (socio-economic- environmental).

Appropriate scale of metrics for monitoring and evaluating progress

- The special and temporal scale: at the project, program, and system
 - Metrics at different scales may be different
 - Organizations at local, state, and federal may evaluate for their respective interests differently (example: ESA- bull trout in Walla- Walla and not being to declassify stream/lake)
- Lack of numeric metrics should not impede progress

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Stage the project, program, or system

- Break down into discrete and measurable components
- Use pilots in the early stages
- Use locally informed planning

External Feedback

- Throughout the process: from problem identification to monitoring progress, to measuring success, to communicating with the community. Constantly build a shared learning.

National level Practical actions:

- Ensure cultural competency training to understand diverse perspectives and what is “valid info”
- Build time into processes to accommodate collective actions and keep all stakeholders informed
- Provide appropriate funding to support collaboration
- Multiyear processes should include annual increments of progress
- PART – Program Assessment Rating Tool = needs to be adapted to collaborative conservation
- Set broad non-prescriptive national goals – let state and local governments – define best approaches on how to reach those goals.
- Established realistic timeframes when using collaborative processes – take longer, permitting involved.
- NEPA reforms: consider using SEPA and/or integrating permitting processes based on national standards, and developing a encompassing monitoring plan. No net loss – use categorical exclusions.
- Programmatic approvals for beneficial practices.
- Science based decisions
- Incorporate qualitative decisions and knowledge into the process, program, system.

Local level Practical actions:

- Ensure cultural competency training to understand diverse perspectives and what is “valid info”
- Build time into processes to accommodate collective actions and keep all stakeholders informed
- Provide appropriate funding to support collaboration
- Use partnerships to accommodate legal, political, and supported measures and decisions.
- Multiyear processes should include annual increments of progress
- PART – Program Assessment Rating Tool = needs to be adapted to collaborative conservation
- Set broad non-prescriptive national goals – let state and local governments – define best approaches on how to reach those goals.

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- Established realistic timeframes when using collaborative processes – take longer, permitting involved.
- Measure the parties respective contributions
- Develop conferences on monitoring – techniques, processes.
- Programmatic approvals for beneficial practices
- NEPA reforms: consider using SEPA and/or integrating permitting processes based on national standards, and developing a encompassing monitoring plan. No net loss – use categorical exclusions
- Science based decisions.
- Incorporate qualitative decisions and knowledge into the process, program, system.

Resources:

- “Dynamic Governance: decision making process www.sociocracy.biz
- John Bude-consultant in Silver Spring
- The Association of Partners For Public Lands works @a very practical, site-specific level to help a public land site work with help start/enhance an agreement-based, site-specific resource- generating partner e.g. friends/association/foundation
- Partnership – federal agency partnership agency website – DOI, USACE, USDA,
- Association of partners for public lands-provides very practical site specific assistance to help start.
- Globe- citizens protocols for monitoring environmental quality, developed by NASA.

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**White House Conference on Cooperative Conservation
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Topic: Measuring Success of Cooperative Conservation Efforts

Session number: 50

Facilitator: Kirk Emerson

Afternoon

Location: 241

A. **Major Repeated Themes Raised in the Discussion.** *A grouping of ideas repeated with some frequency in the session and brought up again during the group summation process. Also includes diverging views and/or questions about the topic.*

- Plan well, monitor effectively, celebrate often
- Incentivize risk/reward risk-takers
- Improve communication among agencies and with state, local and tribal governments as well as among all stakeholders

CHALLENGES:

- It's important to set achievable goals and agree on goals
- Tension between needs of leadership (agency heads) and project managers
- Limited capacity or funding for monitoring program outcomes
- Differentiate between what you can and can't control
 - It takes time for relationship-building—how and what level to initiate/develop partnerships and develop trust
- OMB constraints on employees to evaluate non-federal parties (ICR process)
- Purpose of evaluation—what are we trying to measure; what will that take (don't confuse outputs with outcomes)
- Hard to collaborate with performance based budgeting; performance based on the number of widgets produced; performance-based budgeting makes it difficult to develop partnerships

OPPORTUNITIES:

- Evaluation creates opportunity for flexibility and information to encourage investing in and sustaining cooperative conservation efforts
- Evaluation can tap into important local knowledge from older generations and inform the new generation of property owners and resource users

B. **National-level Practical Actions** *that could be taken by the Federal government, national NGO's, and other national organizations. Diverging views and/or questions are also noted.*

Setting goals and desired outcomes

- More funding for monitoring; must be flexible
- Realistic time tables/parameters
- Agency protocols and policies don't match up; feds should develop common policies; be more streamlined and flexible
- Streamline rules and work through OMB to shift money between federal and state agencies (inter-agency transfer and coordination)
- Get MOUs for buy-in from federal agencies for funding

Monitoring and evaluating progress

- Risk aversion is big issue; support risk-takers "up" through the chain of command; alternative performance review processes
- Multi-year funding essential for partnerships

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- Measuring incremental progress toward goals
- Accountability—commit to the process; be patient with collaboratives

Measuring success/outcomes

- Regional conferences to share evaluation/performance

C. **Local-level Practical Actions** *that could be taken at the local or community level by Tribes, state and local communities, private citizens, and local organizations. Diverging views and/or questions are also noted.*

Setting goals and desired outcomes

- Get all viewpoints on the table to obtain shared goals; find ways to engage all participants
- Performance goals/benchmarks set at local level and approved at (higher) national level
- Interdisciplinary backgrounds for baseline data—measure for certain indicators rather than long term objectives; blend science/expertise into the discussion; adaptive management; readjust or refine goals with more data; add science into goals
- Establish training component for communication/facilitation to identify gaps in data and engage everyone; explain data/definitions

Monitoring and evaluating progress

- Measuring trends, direction based on indicators
- Evaluation isn't punishment but celebration of progress (how to make this fun) (adaptive management)
- It's not just about goal-setting; program theory – establish strategic map for monitoring, recognizing complexity
- Monitor over appropriate time period

D. **Particularly insightful quotes from participants** that capture the essence of key points made during the group's discussion.

- “Plan well, monitor effectively, celebrate often”
- “You’ve got to be able to measure end product”
- “It’s a business to make the environment better;”
- “We need to create knowledge not just information”
- “Engage local people more than we already have;”
- “Goals need to be inclusive of all stakeholders”

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Session number: 50

Facilitator: Robert Jones

Afternoon

Location: 242

A. Major Repeated Themes Raised in the Discussion.

Monitoring and measuring success are essential components for all conservation partnerships. Federal and other partners need to provide funding support for monitoring and measuring as a part of conservation initiatives. *“Evaluation equals conservation accountability.”*

Successful conservation partnerships have clear goals supported by science. Both scientists and citizens can contribute to monitoring, measuring, and achieving conservation objectives. In many cases, citizens and local communities are able to support stronger stewardship roles, when they are involved in resource evaluation and management.

Given the breadth and variety of monitoring data gathered, there is a clear need for archiving and sharing data so that others can use the information.

Better communication and coordination is needed across all levels of government related to establishing goals and measures for conservation partnerships.

Successful partnerships need to balance the tension between what Federal and other Governmental agencies want to measure with what is meaningful to measure at the local level.

If partners do the upfront parts of the process together (setting realistic goals supported by science), then monitoring and measuring progress will be enhanced.

Measuring what we can count does not mean that it is valuable to measure.

B. National-level Practical Actions

Successful conservation initiatives will require partners to join in developing a system to archive data and share information, including best management practices, case studies, and evaluation guidance.

Develop, build upon, and enhance standards and compatible, accessible data among Federal agencies and other partners. Mandate Federal agencies to use these systems in their management processes and decision making.

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Establish the expectation among Federal agencies that evaluation will be budgeted for as part of the process and conservation objectives.

C. Local-level Practical Actions

Utilize and disseminate information on successful approaches for addressing participation of new partners and establishing new goals.

There is a need for education and capacity building and training of local partners in strategic planning partnership processes.

Strive for a limited suite of measures for monitoring. For example, focus on the management policy decisions and what information is needed to inform them.

Incorporate values and recognize trade-offs into the process of setting partnership goals.

D. Particularly insightful quotes from participants that capture the essence of key points made during the group's discussion.

Where did you get the ice cream?

Can we finish early?

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